

# *Town of Bluffton*

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*STRATEGIC PLAN – FISCAL YEARS 2017-18*



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## Town of Bluffton Mayor and Council



Mayor  
Lisa Sulka



Mayor Pro-Tem  
Larry Toomer



Councilman  
Fred Hamilton



Councilman  
Dan Wood



Councilman  
Harry Lutz

## Staff Leadership Team

**Town Manager: Marc Orlando, ICMA-CM, AICP**

**Town Attorney: Terry Finger**

**Deputy Town Manager: Scott Marshall**

**Town Clerk: Sandra Lunceford**

**Assistant Town Clerk: Kim Chapman**

**Chief of Police: Joey Reynolds**

**Finance & Administration Director: Shirley Freeman**

**Human Resources Director: Katherine Robinson**

**Engineering Director: VACANT**

**Growth Management Director: VACANT**

**Don Ryan Center for Innovation Director: David Nelems**

**Bluffton Public Development Corporation Director: VACANT**

## *A Message from Mayor Lisa Sulka*



I am so appreciative of the hard work from Town Council and Staff that went into producing the Town of Bluffton Strategic Plan for Fiscal Years 2017-2018. This plan is much more than the product of a two-day workshop session. It represents the collective vision of an entire town; one that is appreciative of the roots from which it came and is determined to work together to not only preserve our heritage, but to further our community toward an even brighter future. That's a tall order considering the amazing growth that the Town of Bluffton has experienced and is continuing to experience even as I write this.

The latest population estimates put the Town at more than 19,000 residents, a 34% increase since the 2010 census. The word is definitely out that the Town of Bluffton is a prime location for raising families and growing businesses. Guiding that growth and maintaining Bluffton's

Heart of the Lowcountry culture takes careful planning, consideration and public input, all of which were a part of our two-day strategic planning workshop.

I would like to issue a special thank you to the chairs of some of our council-appointed boards, commissions and committees as well as other community leaders who took time from their busy schedules to take part in the workshop: Dr. Al Panu, USCB Chancellor; Berl Davis, Bluffton Public Development Corporation; Wes Jones, May River Watershed Action Plan Committee; Matt Green, Don Ryan Center for Innovation Board; Hank McCracken, Historical Preservation Commission; and Terry Hannock, Planning Commission. Their input was invaluable and very much appreciated.

As both the Mayor and a resident of the Town, I'm excited about the direction we are heading and I'm very pleased to share this Town of Bluffton Strategic Plan with you.

## *A Message from Town Manager Marc Orlando*

It is my privilege as the Town Manager to lead the men and women who will be carrying out policies and executing action items identified in the Town of Bluffton Strategic Plan for 2017-2018. This plan provides clear guidance from the Mayor and Town Council on strategic focus areas that will keep the Town of Bluffton moving forward in the midst of tremendous and sustained growth.

I am confident that our staff is focused, motivated and fully capable of succeeding in accomplishing the strategic action items guiding budget and policy decisions over the next two years. They truly embody the Town's mission statement of taking care of our citizens, the town and each other by continuously making our community and organization better.

Special acknowledgment and thanks go out to the Mercer Group and the facilitators who assisted Town leaders in our strategic planning workshop. The perspectives, guidance and administrative assistance offered by Bill Stipp, Mike Fletcher and Lisa Stipp prompted a productive interaction between elected officials, citizen leaders, staff and members of the public who were in attendance.





# Introduction

## Strategic Action Plan

This plan establishes a road map for activities and initiatives that will achieve the vision for the Town and ensure that Bluffton is poised to capitalize on opportunities to advance key initiatives. This plan is a flexible tool to guide and assist decision-makers with proactive projects and policy development to achieve results that will be enjoyed by current residents and future generations. The plan is designed to highlight key activities and goals for the Town and is aligned with many other planning documents used by the Town. These current and future plans of the Town can be linked to the focus areas, guiding principles and projects included in the strategic plan. The strategic action plan links to the Town's budget process, staff work plans and performance evaluations, town-wide performance measures and Town Council agendas; to ensure the day-to-day relevancy and effectiveness of the plan.



The strategic action plan focuses specifically on activities outside of the day-to-day operational services that the Town provides. The projects included in the strategic action plan are specific, measurable, on a timetable, and assigned to a responsible department/division within the Town. The strategic action plan may also be used as a mechanism to provide status updates on the progress of activities at regular intervals.

The Strategic Action Plan will function as a compass for the Town to continuously make strategic decisions on maintaining and improving its operations.

## The Strategic Planning Process

The goal of the strategic plan is to build an alignment of strategies, projects and performance measures to address focus areas and guiding principles that are included in this document. The development of a new strategic plan for the Town of Bluffton has the following goals:

1. *Focus on citizen expectations and priorities.*
2. *Build on the Town's strengths and address opportunities for improvement.*
3. *Continue to provide an organizational environment committed to delivering exceptional service to citizens, promoting best practices, innovation and cost effectiveness.*
4. *Valuing employees and creating an exceptional work environment.*
5. *Measuring Town services for results.*
6. *Improving development, financial, human services and infrastructure policies, procedures and practices.*



*Mayor Lisa Sulka, and Town Councilmen Fred Hamilton and Dan Wood reflect on instructions provided by the workshop facilitator.*

## Strategic Workshop Planning

### Environmental Scan

The key foundation to developing the strategic action plan was the Environmental Scan. Environmental scan surveys were conducted with the Mayor, Council and the Leadership Team. The surveys provided important information and data for the Mayor, Council, and the Leadership Team to ensure the alignment of town wide priorities and establish the foundation for building the strategic plan.

A two-day Mayor and Council Strategic Planning Retreat was held on Wednesday, February 10th, and Thursday, February 11th, 2016. The retreat relied on information from the Strategic Plan Alignment and Development Surveys and a list of proposed project initiatives to develop the Strategic Focus Areas, Guiding Principles and projects for the strategic action plan. The following is a list of attendees over the two days:

#### Wednesday, February 10, 2016

Lisa Sulka, Mayor	Harry Lutz, Town Council
Fred Hamilton, Town Council	Dan Wood, Town Council
Marc Orlando, Town Manager	Larry Toomer, Town Council
Dr. Al Panu, Chancellor, USCB	Scott Marshall, Deputy Town Manager
Hank McCracken, Chair, Historic Preservation Commission	Shirley Freeman, Director of Finance
Sandra Lunceford, Town Clerk	Kendra Lelie, Director of Growth Management
Terry Finger, Town Attorney	Katherine Robinson, Director of Human Resources
Shawn Leininger, Director of Economic Development	David Nelems, Director of Don Ryan Center
Kimberly Chapman, Deputy Town Clerk/ Executive Assistant to Mayor and Town Manager	Debbie Szpanka, Public Information Officer
Matt Green, Chair, Don Ryan Center for Innovation Board	Kim Jones, Director of Engineering
Berl Davis, Chair, Bluffton Public Development Corporation	Wes Jones, Chair, May River Watershed Action Plan Implementation Committee
Chief Joey Reynolds, Bluffton Police Department	Major Joe Manning, Bluffton Police Department

#### Thursday, February 11, 2016

Lisa Sulka, Mayor	Harry Lutz, Town Council
Fred Hamilton, Town Council	Dan Wood, Town Council
Marc Orlando, Town Manager	Larry Toomer, Town Council
Wes Jones, Chair, May River Watershed Action Plan Implementation Committee	Scott Marshall, Deputy Town Manager
Hank McCracken, Chair, Historic Preservation Commission	Shirley Freeman, Director of Finance
Terry Hannock, Chair, Planning Commission	Berl Davis, Chair, Bluffton Public Development Corporation
Sandra Lunceford, Town Clerk	Kendra Lelie, Director of Growth Management
Terry Finger, Town Attorney	Katherine Robinson, Director of Human Resources
Shawn Leininger, Director of Economic Development	David Nelems, Director of Don Ryan Center
Kimberly Chapman, Deputy Town Clerk/ Executive Assistant to Mayor and Town Manager	Debbie Szpanka, Public Information Officer
Berl Davis, Chair, Bluffton Public Development Corporation	Kim Jones, Director of Engineering
Chief Joey Reynolds, Bluffton Police Department	Major Joe Manning, Bluffton Police Department

## Leadership Team

As the economy stabilizes and improves, the Town now has a strategic compass to continuously make strategic decisions on maintaining and improving its Core Functions: Fiscal Sustainability, Economic Growth, Town Organization, Community Quality of Life, Infrastructure, and the May River and Surrounding Rivers and their Watersheds.

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*"THE BAD LEADER IS HE WHO THE PEOPLE DESPISE; THE GOOD LEADER IS HE WHO THE PEOPLE PRAISE; THE GREAT LEADER IS HE WHO THE PEOPLE SAY, "WE DID IT OURSELVES"*

— PETER M. SENGE, THE FIFTH DISCIPLINE: THE ART & PRACTICE OF THE LEARNING ORGANIZATION

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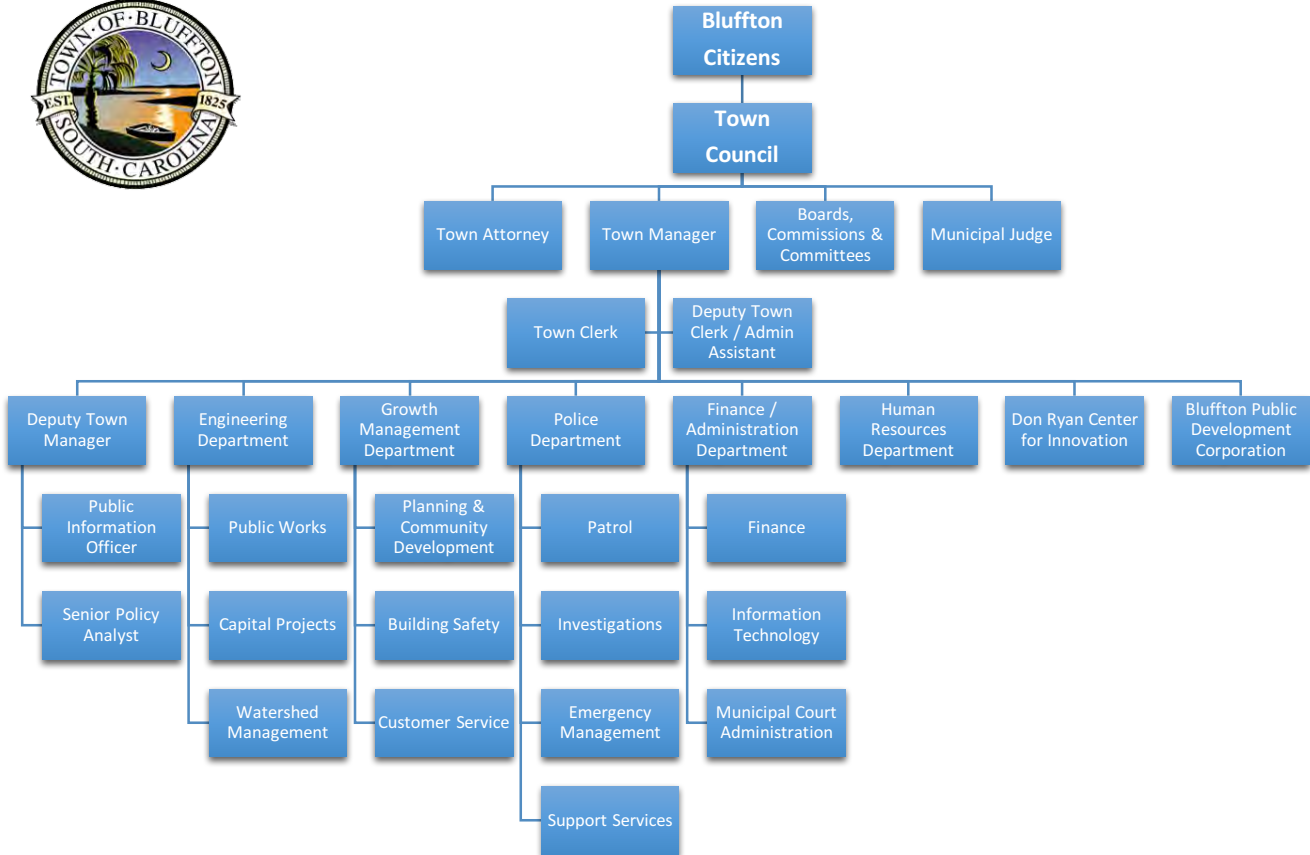
The Mayor, Council and Town Manager Marc Orlando recognized the need to create the Town's strategic plan as a document that all levels of leadership in the organization can own. They involved the Leadership Team, comprised of senior managers, mid-level managers and front line supervisors, to develop the strategic plan. The Leadership Team, of approximately 24 individuals, worked on developing the Strategic Focus Areas, Guiding Principles and the projects that are included in the plan. In developing this document, the Leadership Team recognized their connectivity with one another. Seeing the complete landscape of projects in this plan and what it will take to get them done was an excellent opportunity for the Leadership Team to build cohesion as a team. In this process, the team was reminded that they were no longer limited by the barriers of departments, but instead are able to work across these boundaries to continue to make Bluffton a premier community.



***Bluffton's Farmers Market, attracting thousands of visitors weekly to the Bluffton Historic District and recognized statewide and nationally as one of the best Farmers Markets in the country.***



# Town of Bluffton Organization Chart





## *Town of Bluffton*

The Town of Bluffton is located in Beaufort County, the southernmost coastal county in South Carolina. It is situated on a high bluff overlooking the May River, a pristine waterway that has strongly contributed to the Town's history and continued success. Bluffton is located just 12 miles west of Hilton Head Island, SC and approximately 20 miles northeast of Savannah, GA.

Bluffton expanded its territory by 32,000 acres through annexation of primarily four tracts of undeveloped land, becoming the fifth largest town in South Carolina (by land area).

In 2015, the U.S. Census Bureau re-measured some of the fastest-growing areas in the nation. According to the Bureau, Bluffton's population is now 15,199 residents and is the 5th largest town in South Carolina, in terms of land mass. While the population numbers still classify Bluffton as a small town; town representatives estimate the town serves, in terms of police services and for planning purposes, a daily population of more than 40,000 – 50,000 when tourists and visitors are included.



*The Promenade in the heart of Bluffton's Historic District, home to a variety of businesses and bustling with activity daily.*

## Vision Statement



***BLUFFTON, THE HEART OF THE LOWCOUNTRY, A TOWN  
THAT APPRECIATES THE PAST, FOCUSES ON TODAY AND  
IS PLANNING TOGETHER FOR A GREATER FUTURE.***

### Explanation

Bluffton is a welcoming and inclusive community, committed to retaining its historic nature, livable neighborhoods, active lifestyle and respect for the May River. We are committed to work together to create a great community now and one that is also sustainable for the generations to come.

## Mission Statement

***WE TAKE CARE OF OUR CITIZENS, THE TOWN AND EACH  
OTHER BY CONTINUOUSLY MAKING OUR COMMUNITY  
AND ORGANIZATION BETTER.***



### Explanation

The Town organization is committed to:

- Providing excellent services by continuously looking for improvements in services using best practices.
- Providing award winning fiscal management services to our citizens.
- Providing exceptional customer service that is focused on solutions and meeting the needs of our citizens.
- Providing meaningful public engagement opportunities for our community.
- Providing a work environment committed to teamwork, communication, transparency, ethical behavior and progressive compensation to help employees reach their full potential.
- Providing and using performance measures to determine if our services are getting the intended results.

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# Strategic Focus Areas and Guiding Principles

## Definitions

**Strategic Focus Area** – This is the intersection of the Town’s Mission and Vision with the needs of its residents and the Town’s organizational competency. These focus areas are designed to keep the organization’s priorities from getting distracted by what may appear to be competing opportunities. This strategic focus will drive policy decisions and priorities for the Town.

**Guiding Principles** – The strategies guiding the consistent execution of projects, policies and programs that continuously work toward achieving the goals expressed in the strategic focus areas.

## Strategic Focus Areas and Guiding Principles



## Town of Bluffton Strategic Focus Areas

Strategic focus is a systems view that is consistent with several similar concepts such as: Peter Drucker's theory of business, Gary Hamel and C.K. Prahalad's strategic intent, Jim Collin's Hedgehog Concept, and Michael Porter's fit and position. The four “systems” views that should drive every organization are: purpose, function, process, and structure.

The strategic focus areas tie to three of these: The Town’s Mission and Vision, one of the foundations for the focus areas, tie to Purpose; the needs of the Town, which are articulated in the focus areas are linked to Function, and the organizational competency expressed in the focus areas are aligned with Process. Structure is not related to an element of the strategic focus areas, because structure answers the “how” question. The purpose, function, and process elements are essentially “what” questions. In strategy development, the “what” questions drive the “how” question. The “how” is represented by the guiding principles under each focus area. Although an organization can operate without this strategic focus, there is strong evidence to indicate that organizations that develop and have the discipline to adhere to a strategic focus have significant long-term sustainability.

## May River and Surrounding Rivers and Watersheds

The Town of Bluffton is committed to protecting and enhancing the environment of the May, Okatie/Colleton and New Rivers and their watersheds. The Town will support and encourage initiatives that continuously improve the water quality and the economic viability of the watersheds. The Town of Bluffton is the Heart of the Lowcountry and the May River is the heart of Bluffton. We will celebrate the May River while our community's history, culture, and environment is protected for future generations.

### Guiding Principle 1

*Support initiatives, such as the May River Watershed Action Plan, to improve water quality of the May, Okatie/Colleton and New Rivers and their watersheds.*

### Guiding Principle 2

*Seek collaboration and partnerships that protect, and improve the May, Okatie/Colleton and New Rivers and their watersheds.*



***Panoramic view of the May River, Bluffton's natural backdrop and largest natural resource.***

### Guiding Principle 3

*Celebrate the May River, its heritage and importance to the community.*

### Related Strategic Plan Action Items

Action Item	Description	Responsible Department
1	Implement the May River Watershed Action Plan priority stormwater projects <ul style="list-style-type: none"><li>• Hampton Lake</li><li>• Wetland Restoration</li><li>• Hampton Hall</li></ul>	Engineering
2	Stormwater Ordinance revisions as needed to support the MS4 Program and meet Federal and State requirements	Engineering
3	Develop a sewer connection policy and program identifying potential funding	Growth Management

## Town Organization

The Town of Bluffton will update and refine programs, policies, and projects that create a clean, safe, and sustainable workplace. The Town will provide a working environment and benefits to attract and retain a workforce that is committed to providing outstanding service to its citizens at an exceptional value for their tax dollars.

### Guiding Principle 1

*Establish clear management expectations for all employees and volunteers of the Town.*

### Guiding Principle 2

*Develop initiatives to improve communication and transparency for Town employees through “Open Book Management” concepts.*

### Guiding Principle 3

*Create and maintain a culture of ownership by empowering employees to make decisions. Ensure employees have the necessary intellectual and physical resources to efficiently and effectively perform their jobs and provide excellent customer service.*

### Guiding Principle 4

*Implement programs and develop projects that create a professional, safe, value-oriented, accountable and responsive work environment with opportunities for education, advancement, and job fulfillment.*

### Guiding Principle 5

*Evaluate and implement opportunities to foster employee involvement in meaningful ways that strengthen their relationships internally and within the community to promote a sense of cooperation and unity.*

### Guiding Principle 6

*Develop training, systems, and policies that continuously improve governance and teamwork between the Mayor and Council, the Town Manager, the Leadership Team, Town Staff and the various boards and commissions.*



*One of the Town of Bluffton's famed directional signs, alerting pedestrians to some of the town's more frequently visited locations in the Historic District.*



# Town Organization

## Related Strategic Action Plan Items

Action Item	Description	Responsible Department
54	Consideration to provide public access to Town Council Meetings with live stream capabilities	Executive Office
55	Establish a Town of Bluffton staff, Boards, Commissions, and Committee's Customer Service Institute	Executive Office
56	Implementation of IT Strategic Plan	Finance
57	Implementation of File Management and Records Retention Plan	Finance
58	Assess asset management software to assist in the tracking, documentation, maintenance, and overall management of Town-owned assets	Engineering
59	Initiate the update of the 2007 Comprehensive Plan as required by State Law	Growth Management
60	New Employee Onboarding and Integration	Human Resources
61	Town Staff Corporate Social Responsibility Program	Human Resources
62	Enhancements to Voluntary Benefits - Telemedicine and Long Term Care Coverage	Human Resources
63	Move into new 3600 sq. ft. location at Kroger Marketplace	Don Ryan Center for Innovation
64	Investigate feasibility of increasing number of Town Council members from 5 to 7	Executive Office

*Town Manager Marc Orlando, Mayor Lisa Sulka and Councilman Fred Hamilton participating in the 2016 Strategic Planning Workshop, held at the Bluffton Rotary Community Center February 10-11.*



## Economic Growth

The Town of Bluffton will seek diverse, high quality and sustainable development that will foster local jobs, enhance our quality of life and culture through the strategic pursuit of knowledge based job sectors including: environmental, small businesses, creative, entrepreneurial initiatives, renewable energy, aerospace, medical, tourism, and light manufacturing. As a regional economic center with a diverse economy, business investment and sustainability will be fostered through streamlined processes, ongoing collaborative relationships, partnerships and/or alliances.

### Guiding Principle 1

*Ensure the Town's development services are continually streamlined, efficient, customer focused and responsive to efficiently support local economic development.*



**Mayor Lisa Sulka addressing the Hilton Head Island-Bluffton Chamber of Commerce's 20<sup>th</sup> Annual State of the Region in October, 2015.**

### Guiding Principle 2

*Update and refine a long-range planning vision e.g., comprehensive plan, Old Town Master Plan, Buck Island-Simmonsville Neighborhood Plan and the May River Watershed Action Plan, that incorporates citizen and stakeholder input to provide a road map for strategic economic development, infrastructure and budget planning.*

### Guiding Principle 3

*Focus on strategic economic development pursuits that will increase local jobs, generate additional revenue and create demand for supporting businesses.*

### Guiding Principle 4

*Foster support of local businesses through ongoing engagement and communication to ensure that Town policies and priorities support their growth and long-term success.*

### Guiding Principle 5

*Develop and implement a collaborative Economic Gardening strategy with local businesses.*

### Guiding Principle 6

*Support place-based economic development strategies that invest in public amenities to enhance our quality of life and thereby drive economic growth.*

# Economic Growth

## Related Strategic Plan Action Items

Action Item	Description	Responsible Department
31	Assess future Old Town Historic District Municipal Improvement District or Main Street Program	Executive Office
32	Coordinate and facilitate the implementation of a Teacher's Village with Beaufort County School District	Growth Management
33	Establish a fee to be assessed on certain building permits that is earmarked to support eligible affordable and workforce housing programs	Growth Management
34	Update and consolidate the memorandum of understanding between the Town and the Bluffton Historic Preservation Society	Growth Management
35	Initiate discussions with Celebrate Bluffton to create a memorandum of understanding with the Town	Growth Management
36	Update of the National Historic District Register to more closely align with the local district including historical research of the Buck Island Simmonsville Road neighborhood, Eagle's Field and Goethe/Shultz Road neighborhood	Growth Management
37	Develop an incentive program to promote historic preservation through mechanisms such as the establishment of tax incentives authorized by the State of South Carolina Bailey Bill and / or a façade improvement program	Growth Management
38	Implementation of eReview system for the online submittal and digital review of development and building permit applications	Growth Management
39	Coordinate with Beaufort County on the development of a county-wide economic development framework, organization, and process for implementation	Bluffton Pubic Development Corporation
40	Continue to build relationships with the South Carolina Department of Commerce, South Carolina Power Team, Beaufort County, Hilton Head Island, and other regional and state economic development organizations	Bluffton Pubic Development Corporation
41	Increase the Buckwalter Place MCP expenditure cap with Beaufort County	Bluffton Pubic Development Corporation
42	Expand the Buckwalter Place MCP area with Beaufort and Jasper Counties	Bluffton Pubic Development Corporation
43	Market the Bluffton Village property for sale to targeted market sectors	Bluffton Pubic Development Corporation
44	Center for cultural events	Executive Office



# Fiscal Sustainability

The Town of Bluffton will update and refine innovative and responsible policies and business practices to effectively manage its fiscal and human resources. The Town will maintain a stable, transparent, forward-looking financial environment that provides an outstanding quality of life for our citizens. Business practices will be efficient, business friendly and ensure exceptional customer service to all stakeholders and citizens.

## Guiding Principle 1

*Demonstrate fiscal responsibility through established financial policies, budgeting practices and financial standards that meet the excellence requirements and benchmarks for financial reporting established by the Governmental Finance Officer Association (GFOA) and the Government Accounting Standards Board (GASB).*



*Mayor Pro-Tem Larry Toomer, Councilman Harry Lutz and Chief of Police Joey Reynolds listen intently while Town Manager Marc Orlando discusses fiscal sustainability during the February 2016 Strategic Planning Workshop.*

## Guiding Principle 2

*Implement business processes and operational efficiencies to streamline the cost of government including the examination and identification of the cost of services and recovery policies.*

## Guiding Principle 3

*Implement a human capital plan that allows the Town to proactively recruit, plan for, maximize, and retain top human resources.*

## Guiding Principle 4

*Implement innovative technology initiatives to support Town business processes, customer service and encourage private development investment.*

## Guiding Principle 5

*Create and pursue opportunities for collaboration and regional partnerships to maximize resources and address regional issues.*

## Related Strategic Plan Action Items

Action Item	Description	Responsible Department
52	Evaluate Potential Additional Revenue Sources: <ul style="list-style-type: none"> <li>• Charge for Special Events</li> <li>• Grants</li> <li>• Sale of Town assets</li> <li>• Council position on Local Option Sales Tax</li> </ul>	Finance
53	Budget Policy: <ul style="list-style-type: none"> <li>• Budget fund balance (General Fund) and TIF debt service for Town Hall redevelopment</li> <li>• Budget annually General Fund monies based on a percentage of the business license revenue for business development and support</li> <li>• Fund part or all operating cost charged in Stormwater in the General Fund to provide more money for capital projects</li> </ul>	Finance

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## Community Quality of Life

The Town of Bluffton will update, support and provide policies, programs, gathering places, and events that sustain our vibrant, unique and authentic community. Our community can come together to celebrate and preserve its culture and history while enhancing the quality of life. Sustainable relationships with the community will be cultivated through citizen engagement, outstanding customer service, and clear, accessible communication.



**Police Chief Joey Reynolds and Officer Lauren Brown, recipient of the First Tee of the Lowcountry 2016 Community Leadership Award.**

### Guiding Principle 1

*Support and create partnerships with public/private educational institutions and local school leadership. Provide multi-generational development programs to ensure quality education and recreational opportunities.*

### Guiding Principle 2

*Create an enhanced connection with neighborhoods throughout the Town through focused outreach and strategic utilization of various communication methods.*

### Guiding Principle 3

*Enhance public safety business process improvements and innovative programs that ensure a safe community.*

### Guiding Principle 4

*Support initiatives and evaluate community policies, programs, gathering places, and events that promote healthy and quality lifestyles for our diverse citizenry.*

### Guiding Principle 5

*Foster place based initiatives and Town codes that support a clean, well-maintained, sustainable community while protecting our natural resources including the May River.*



## Community Quality of Life

### Related Strategic Plan Action Items

Action Item	Description	Responsible Department
45	<p>Review Town Code and align provisions with State Law, Unified Development Ordinance and best practices. Immediate amendments include:</p> <ul style="list-style-type: none"> <li>• Towing Ordinance</li> <li>• Parking Ordinance</li> <li>• Community Events Ordinance</li> <li>• Animal Ordinance</li> <li>• Mobile Vending Ordinance</li> <li>• Park Rules Ordinance</li> <li>• Affordable Housing Building Permit Fee</li> <li>• Property Maintenance Code</li> <li>• Building Code Ordinance</li> <li>• Bailey Bill</li> <li>• Unsafe, Uninhabited Structures Ordinance</li> </ul>	Executive Office
46	Addition of static License Plate Recognition Systems	Police Department
47	Coordinate transit services supporting Old Town Bluffton and other areas with the Lowcountry Regional Transit Authority	Growth Management
48	<p>Provide updates to the UDO to include:</p> <ul style="list-style-type: none"> <li>• Historic District architectural standard revisions to improve user-friendliness, remove redundancies and conflicts, and clarify terms and requirements;</li> <li>• Establish a minor subdivision application;</li> <li>• Update the sign regulations in accordance with recent court decisions;</li> <li>• Remove the silviculture application process in accordance with State Law; and</li> <li>• Require the provision of street lighting with qualifying development activities</li> </ul>	Growth Management
49	Develop a Neighborhood Revitalization Plan (Plan) for Goethe/Shultz Road neighborhood with the goal of applying for a Community Development Block Grant that will aid in the capital improvements identified in the Plan	Growth Management
50	SCE&G Powerline trimming policy	Executive Office
51	Community Park on the May River	Executive Office

## Infrastructure

The Town of Bluffton will strategically plan, implement and maintain current and future infrastructure and facilities that support the community's quality of life, economic viability, and protects the environment.

### Guiding Principle 1

*Establish routine and industry best practice maintenance guidelines to monitor the efficiency and operability of current below and above grade infrastructure and facilities.*

### Guiding Principle 2

*Identify programs, technologies or resources to compliment current operational practices that ensure the sustainability of existing infrastructure and facilities.*

### Guiding Principle 3

*Establish long-term planning, prioritization and investment strategies for future infrastructure and facilities that improve the quality of life for citizens while being financially sustainable.*



***Dubois Park on Boundary Street, a popular gathering spot for all generations. The park boasts a full playground with artificial turf, complete with a replica wooden play ship, several bench swings, picnic pavilion and bathrooms.***

# Infrastructure

## Related Strategic Plan Action Items

Action Item	Description	Responsible Department
4	Expansion of public safety cameras	Engineering
5	Bonding Buckwalter Place Multi-County Commerce Park Fee in Lieu of Taxes revenue for public infrastructure at Buckwalter Place	Finance
6	Bridge Street Enhancements	Engineering
7	Dr. Mellichamp Drive Streetscape Improvements	Engineering
8	Bluffton Road Streetscape Enhancements	Engineering
9	Street Light Expansion	Engineering
10	Cove Skids	Engineering
11	Calhoun Street Bollards – Phase 2	Engineering
12	Pedestrian Safety Enhancements including lighted crosswalks in high traffic areas of Old Town	Engineering
13	Calhoun Street Dock Improvements	Engineering
14	Buck Island Road / Simmonsville Road Sewer Phase 5 A – C Installation	Engineering
15	Goethe Road Phase 2 Sidewalk and Pedestrian Safety Improvements	Engineering
16	Old Town Lighting	Engineering
17	Land Acquisition	Executive Office
18	Dog Park	Engineering
19	Negotiate a construction management agreement with Southeastern Development Associates to facilitate construction of public infrastructure and the Don Ryan Center for Innovation (DRCI) at Buckwalter Place Commerce Park	Bluffton Public Development Corporation
20	Old Town streets ownership and maintenance (ghost roads/orphaned roads, etc.)	Growth Management
21	Bullet-proof glass at Law Enforcement Center	Police Department
22	Town-wide wayfinding program	Growth Management
23	Jason and Able Streets Public Sewer Installation	Engineering
24	Town Hall Renovation	Engineering
25	Garvin House Historic Preservation	Engineering
26	May River Road Streetscape	Engineering
27	Goethe Road Sidewalk Improvements - Phase 1	Engineering
28	Pine Ridge Stormwater Pilot Projects - 319 Grant	Engineering
29	Stoney Creek Wetland Restoration	Engineering
30	Buck Island Road / Simmonsville Road Sewer Phase 4	Engineering

## Performance Measures

A performance measure is a numeric description of an organization's work and the results of that work. Performance measures are based on data, and tell a story about whether an organization or activity is achieving its objectives and if progress is being made toward achieving policy or organizational goals. In technical terms, a performance measure is a quantifiable expression of the result of activities that indicate how much, how well and/or at what level services are provided during a given time period. Quantifiable means the description can be counted more than once or measured using numbers while results are what the city's work is intended to achieve or accomplish for its residents.

There are several reasons to measure, monitor and report performance of our work. There's an old saying, "if it's not measured it's not done"; performance measurement tells managers something important about the organization's services and processes. Performance measures are a tool to help understand, manage, and improve. In short, performance measurement provides data and information necessary to make informed decisions while providing a snapshot of current performance capabilities and the ability to track whether actual performance is getting better, staying the same, or getting worse over time. The best performance measures start conversations about organizational priorities, the allocation of resources, ways to improve performance, and offer an honest assessment of effectiveness.

Although performance measures may have a number of characteristics, these have been established by the Governmental Accounting Standards Board and are used in almost every kind of performance audit. Performance Measures should be:

- **Relevant** measures matter to the intended audience, and clearly relate to the activity being measured. Logic models are a way of establishing relevant measures.
- **Understandable** measures are clear, concise, and easy for a non-specialist to comprehend. This applies to language used in the title and description, and to technical aspects of the measure.
- **Timely** measures have information available frequently enough to have value in making decisions.
- **Comparable** measures have enough data to tell if performance is getting better, worse or staying about the same. They also provide the reader with a frame of reference or context to tell if current performance meets or exceeds expectations.
- **Reliable** measures have data that is verifiable, free from bias, and an accurate representation of what it is intended to be.
- **Cost-effective** measures justify the time and effort to collect, record, display, and analyze the data given the measure's value. Another aspect of cost-effectiveness is feasibility. For instance, an ideal metric may require data collection, the scope and scale of which is far beyond its potential usefulness.

Performance measures may have other desirable characteristics, too:

- **Useful** measures help people doing the work understand what is happening with their business process, and how to get better results for customers.
- **Influence** relates to the ability of an agency to influence a measure, to "move the needle on the dial when they push on the pedal." Some measures are important enough to society that we want to track them, even though a single agency's influence on them may be difficult to discern. These are often called indicators.
- **Significant** measures are those that are most important to representing performance. For instance, we can measure an almost infinite number of things about our body (weight, bicep size, body mass, resting heart rate, etc.) but medical science has identified a significant few that are appropriate to use under given circumstances.
- **Feasible** measurable data is on hand or the department can reasonably expect to collect it.

Reference: Government Accounting Standards Board (GASB), *Performance Reporting for Government, Characteristics Performance Information Should Possess*, adapted from GASB Concepts Statement No. 2, *Service Efforts and Accomplishments Reporting* (2008): <http://www.seagov.org/aboutpmg/characteristics.shtml>



# Performance Measures

There are four types of typical performance measures that are quantifiable and results oriented:

- **Output Measures** (workloads) – The amount of work performed (bean counting)
- **Efficiency Measures** – Work performed vs. resources needed to do it
- **Outcome Measures** (effectiveness)
- **Combined efficiency and effectiveness** – rarely used

Town Departments will focus on developing their own measures while keeping in mind the proposed strategic focus areas and guiding principles previously agreed upon. Below are a few examples of performance measurements for each strategic focus area to assist departments in developing their performance measures:

## May River & Surrounding Rivers and Watersheds

*Execution of May River Watershed Action Plan*  
*Implementation of MS4 Permit*  
*Public participation in cleanup initiatives*

## Town Organization

*Annual Employee Survey Results*  
*Annual compliance with mandated training*  
*Number of internal communications to maintain “open book” management*  
*Bi-annual Citizen Satisfaction Survey and EE Satisfaction Survey (select metrics from surveys)*

## Infrastructure

*Annual roadway condition reports*  
*Annual water loss*  
*Number, location and severity of water main breaks*  
*Cost effectiveness of each city owned building*  
*Cost effectiveness of city owned vehicle maintained Roads-Annually*  
*Water service disruptions*  
*Sanitary sewer overflows (# of unpermitted discharges)*

## Fiscal Sustainability

*Compliance with newly established financial policies*  
*Five Year Revenue and Expenditure Projections, updated Annually*  
*Monitor accuracy of projections*  
*GFOA Financial and Budget Reporting Awards – Annually*  
*Maintain City Reserve Fund Balance – Annually (Fund balance per capita)*  
*Cost of service and cost recovery policies*

## Economic Growth

*Sales tax revenues quarterly*  
*Number of new business licenses quarterly*  
*Processing time of plan reviews and permits*  
*Number of new prospects opened compared to success rate*

## Community Quality of Life

*Types of calls for Public Safety services and location within city*  
*Cost effectiveness of Emergency Medical Services*  
*Crime statistics by FBI type*  
*Types and participation of recreational programs*  
*Readership of City generated communications*  
*Effectiveness of environmental (including sanitation) programs*  
*Number of inspections – fire, building, code, etc*

## Four Square Management© bridgegroupllc

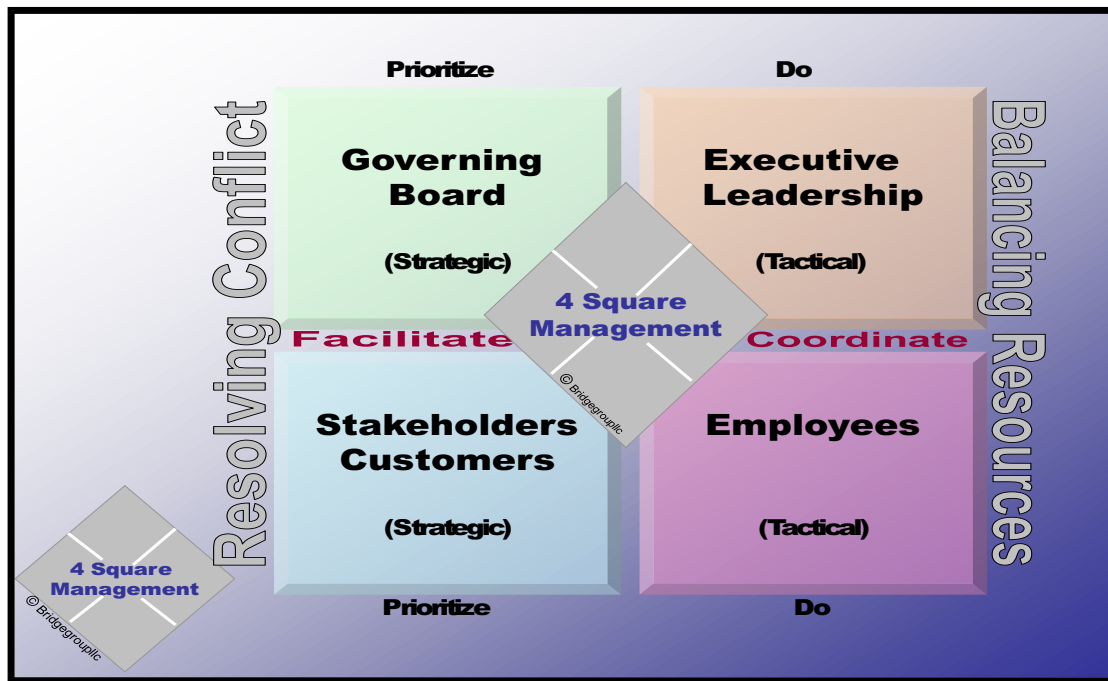
### Building Collaborative Leaders Using Four Square Management© bridgegroupllc

The Town of Bluffton will be using Four Square Management as a project-planning tool to implement strategic plan projects. The tool is designed to provide a checklist for the Town to use to improve the implementation of key initiatives (projects). Town departments will use the Four Square Management checklist to ensure that all key components of planning a successful project have been met.

Four Square Management serves as a compass for aligning strategy with the operational implementation of new initiatives and also promotes collaborative decision-making. The vacuum that is often created without proper planning on new initiatives can result in problems when implementation creates unexpected consequences. A simple, but impactful example of unexpected consequences is when an organization implements a project, but the staffing and long-term financial resources to effectively manage the initiative are not considered. The Mayor, Council and Town Manager think it is important for the Town to have a tool that provides a clear guide to the organization by avoiding the potential pitfalls of unintended consequences on new initiatives.

Four Square Management provides a checklist for departments to use when developing and implementing new initiatives (projects). The key to success when implementing new initiatives is finding the balance among:

- *Stakeholder/Customer Expectations*
- *Mayor and Council Expectations*
- *Department's Capacity to implement the project*
- *Capacity of employees to execute the project for Stakeholder/Customer*



## *Four Square Management@ bridgegroupllc*

Four-Square Management is a tool to strategically and tactically guide the Town departments through a measured process of improving the effectiveness of implementing new initiatives. How does Four Square Management work? Prior to implementing any new initiatives, the following questions should be addressed under each of the categories:

### **Stakeholder/Customer Expectations**

- *Is this initiative consistent with the Town's Mission and Vision?*
- *Is it one of our stated strategic priorities or strategic focus areas in the Strategic Plan?*
- *Does it resolve an immediate and pressing problem that is appropriate for the organization to address?*
- *If funding is involved, can this initiative be sustained over the next five years or longer with other competing budget priorities?*

### **Mayor and Council Expectations**

- *What are the outcomes we will use to determine if this initiative is successful?*
- *When will the initiative be reviewed to determine how it is being implemented?*
- *What are the best practices for this initiative?*

### **Management capacity to implement the policy**

- *Do we have the necessary operational procedures to implement the initiative?*
- *If the initiative requires technology, is it in place or do we have to purchase it?*
- *Is a performance measurement system in place to track the outcomes or results of the initiative?*
- *Do we have the necessary structure and supervisory capacity to implement the initiative?*
- *Do we need a field trip to an organization that has developed and implemented the initiative?*
- *What are contingency plans if the initiative has problems while being implemented?*
- *What is our communication strategy for the initiative and the spokesperson?*

### **Capacity of employees to execute the policy for the stakeholders/Customers**

- *Has input from employees been received on how to implement the initiative effectively?*
- *Is employee training required to implement the initiative?*
- *How will implementing this initiative impact current work cycles for services?*
- *How will implementing the initiative affect timelines on any other initiatives approved in the Strategic Plan?*

The Four Square Management model can provide the platform for implementing a more collaborative and result oriented approach for the Town. This simple template for the Town departments to use should not delay the development of new initiatives. It will help to make sure the initiative has run the gauntlet for its successful implementation.

## Integrated Strategic Plan



## Integrated Strategic Planning Cycle

The strategic action plan is a living document. The Town will update the strategic action plan, as needed, during the budget review and development process. Projects in the plan requiring funding over the next fiscal year will be identified. Projects should also be updated and reviewed at this time. New projects, if any, should also be identified and included in the strategic plan for the fiscal year or subsequent years. Performance measures should be reviewed and, if required, updated during this process.

In developing budget requests for future fiscal years, the Mayor, Council and management should review:

- *Any strategic projects requiring funding*
- *Any new proposed strategic plan projects*
- *The staff's work plan for the new fiscal year*
- *Performance measurement adjustments, if any, for the new fiscal year*

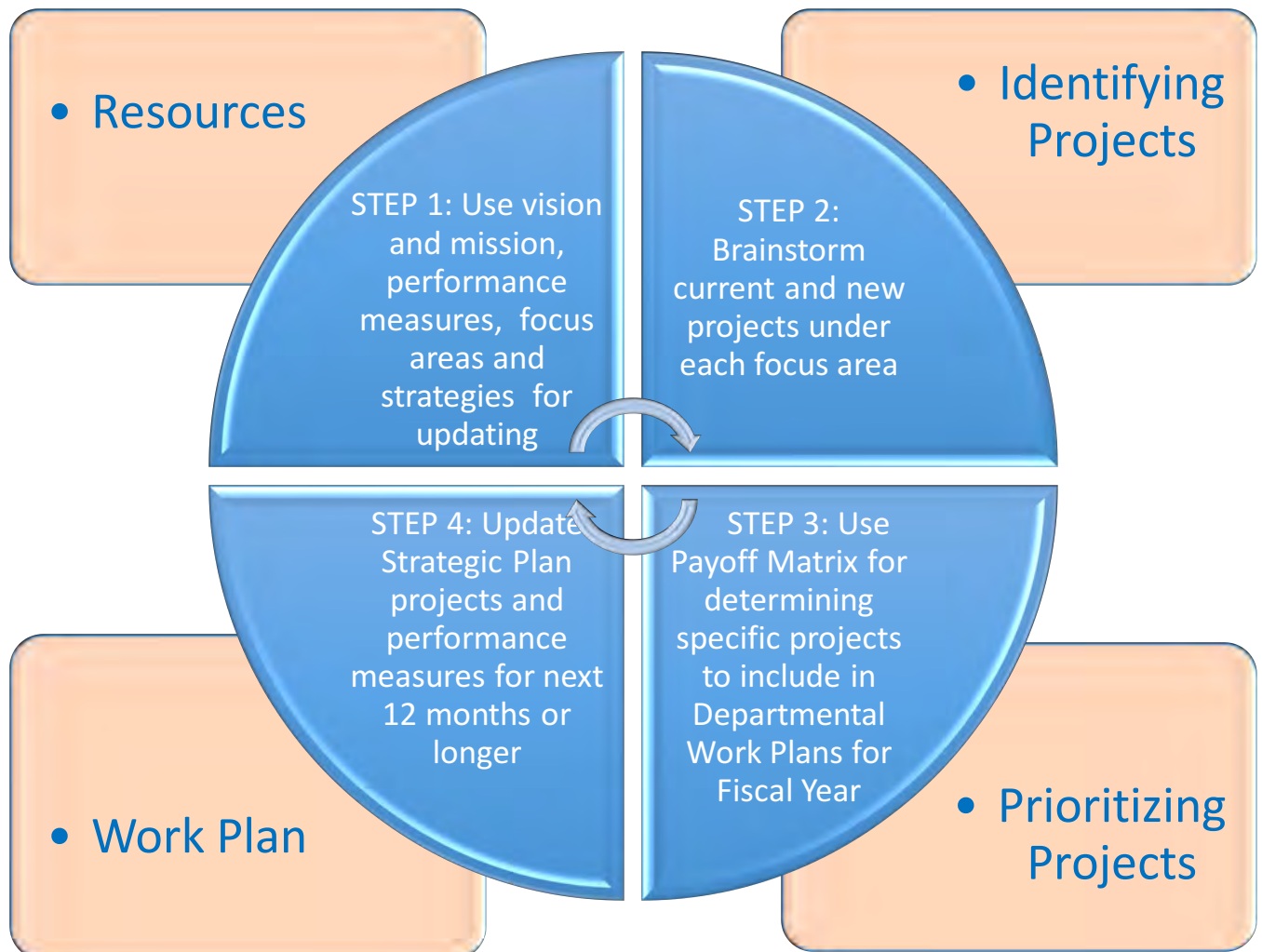


## Sustainable Strategic Plan

Building a sustainable Strategic Plan relies on four simple steps.

1. **Resources-** Use the Vision and Mission statements, Strategic Focus Areas, and performance data to provide information for brainstorming new projects under the plan.
2. **Identifying Projects-** Under each one of the focus areas, potential projects for the next 12 months or longer should be identified through brainstorming. At this point all projects, including new projects will be considered until they are prioritized.
3. **Prioritizing Projects-** Using the Payoff Matrix to prioritize the list of identified projects and determine the work plan for the next 12 months or longer.
4. **Work Plan-** Projects in the work plan and current or new performance measures are finalized for the strategic plan update.

### Sustainable Strategic Plan Diagram



## Sustainable Strategic Plan (continued)

### The Payoff Matrix

The “Payoff Matrix” provides a tool for the Town to use for identifying projects that are either easy or difficult to implement, but result in a high impact on the organization. The purpose of the matrix is to stay in quadrants 1 and 2. In 2016, the Town of Bluffton developed high impact projects to improve the quality and results of the services it provides to the community. Annually using the Payoff Matrix, departments can prioritize which projects meet this requirement in future years.

	Easy to Accomplish	Difficult to Accomplish
High impact on the organization/community	1	2
Low impact on the organization/community	3	4



*The Mayor, Town Council, members of staff, and Mrs. Jerry Reeves, III cutting the ceremonial ribbon marking the completion of a major renovation project phase at Oyster Factory Park in the Historic District. The newly renovated park offers two boat ramps, an observation deck, expanded parking opportunities and a floating courtesy dock.*

# **Appendix A**

## **Table Of Strategic Action Items**

*Town of Bluffton Strategic Action Plan 2017-18*

Index #	Strategic Initiative	Responsible Dept	Strategic Focus Area	FY Implementation
1	Implement the May River Watershed Action Plan priority stormwater projects including: • Hampton Lake; • Wetland Restoration; and • Hampton Hall	Engineering	May River & Other Watersheds	17-18
2	Stormwater Ordinance revisions as needed to support the MS4 Program and meet Federal and State requirements	Engineering	May River & Other Watersheds	17
3	Develop a sewer connection policy and program identifying potential funding sources and partners	Growth Management	May River & Other Watersheds	17
4	Expansion of public safety cameras	Engineering	Infrastructure	17
5	Bonding Buckwalter Place Multi-County Commerce Park Fee in Lieu of Taxes revenue for public infrastructure at Buckwalter Place	Finance	Infrastructure	17
6	Bridge Street Enhancements	Engineering	Infrastructure	18
7	Dr. Mellichamp Drive Streetscape Improvements	Engineering	Infrastructure	17
8	Bluffton Road Streetscape Enhancements	Engineering	Infrastructure	18
9	Street Light Expansion	Engineering	Infrastructure	17-18
10	Cove Skids	Engineering	Infrastructure	TBD
11	Calhoun Street Bollards – Phase 2	Engineering	Infrastructure	17
12	Pedestrian Safety Enhancements including lighted crosswalks in high traffic areas of Old Town	Engineering	Infrastructure	18
13	Calhoun Street Dock Improvements	Engineering	Infrastructure	17-18
14	Buck Island Road / Simmonsville Road Sewer Phase 5 A – C Installation	Engineering	Infrastructure	17-18
15	Goethe Road Phase 2 Sidewalk and Pedestrian Safety Improvements	Engineering	Infrastructure	17-18
16	Old Town Lighting	Engineering	Infrastructure	17-18
17	Land Acquisition	Executive Office	Infrastructure	17-18
18	Dog Park	Engineering	infrastructure	17
19	Negotiate a construction management agreement with Southeastern Development Associates to facilitate construction of public infrastructure and the Don Ryan Center for Innovation (DRCI) at Buckwalter Place Commerce Park	Bluffton Public Development Corporation	Infrastructure	17
20	Old Town streets ownership and maintenance (ghost roads/orphaned roads, etc.)	Growth Management	Infrastructure	17
21	Bullet-proof glass at Law Enforcement Center	Police Department	Infrastructure	TBD
22	Town-wide wayfinding program	Growth Management	Infrastructure	18
23	Jason and Able Streets Public Sewer Installation	Engineering	Infrastructure	17
24	Town Hall Renovation	Engineering	Infrastructure	17
25	Garvin House Historic Preservation	Engineering	Infrastructure	16-17
26	May River Road Streetscape	Engineering	Infrastructure	16-17
27	Goethe Road Sidewalk Improvements - Phase 1	Engineering	Infrastructure	17
28	Pine Ridge Stormwater Pilot Projects - 319 Grant	Engineering	Infrastructure	16-17
29	Stoney Creek Wetland Restoration	Engineering	Infrastructure	TBD
30	Buck Island Road / Simmonsville Road Sewer Phase 4	Engineering	Infrastructure	16-17



*Town of Bluffton Strategic Action Plan 2017-18*

Index #	Strategic Initiative	Responsible Dept	Strategic Focus Area	FY Implementation
31	Assess future Old Town Historic District Municipal Improvement District or Main Street Program	Executive Office	Economic Growth	TBD
32	Coordinate and facilitate the implementation of a Teacher's Village with Beaufort Housing Authority and Beaufort County School District	Growth Management	Economic Growth	TBD
33	Establish a fee to be assessed on certain building permits that is earmarked to support eligible affordable and workforce housing programs	Growth Management	Economic Growth	TBD
34	Update and consolidate the memorandum of understanding between the Town and the Bluffton Historic Preservation Society	Growth Management	Economic Growth	17
35	Initiate discussions with Celebrate Bluffton to create a memorandum of understanding with the Town	Growth Management	Economic Growth	18
36	Update of the National Historic District Register to more closely align with the local district including historical research of the Buck Island Simmonsville Road neighborhood, Eagle's Field and Goethe/Shultz Road neighborhood	Growth Management	Economic Growth	18
37	Develop an incentive program to promote historic preservation through mechanisms such as the establishment of tax incentives authorized by the State of South Carolina Bailey Bill and / or a façade improvement program	Growth Management	Economic Growth	17-18
38	Implementation of eReview system for the online submittal and digital review of development and building permit applications	Growth Management	Economic Growth	18
39	Coordinate with Beaufort County on the development of a county-wide economic development framework, organization, and process for implementation	Bluffton Public Development Corporation	Economic Growth	17
40	Continue to build relationships with the South Carolina Department of Commerce, South Carolina Power Team, Beaufort County, Hilton Head Island, and other regional and state economic development organizations	Bluffton Public Development Corporation	Economic Growth	17
41	Increase the Buckwalter Place MCP expenditure cap with Beaufort County	Bluffton Public Development Corporation	Economic Growth	17
42	Expand the Buckwalter Place MCP area with Beaufort and Jasper Counties	Bluffton Public Development Corporation	Economic Growth	17
43	Market the Bluffton Village property for sale to targeted market sectors	Bluffton Public Development Corporation	Economic Growth	17-18
44	Center for cultural events	Executive Office	Economic Growth	TBD

*Town of Bluffton Strategic Action Plan 2017-18*

Index #	Strategic Initiative	Responsible Dept	Strategic Focus Area	FY Implementation
45	Review Town Code and align provisions with State Law, Unified Development Ordinance and best practices. Immediate amendments include: <ul style="list-style-type: none"> <li>• Towing Ordinance</li> <li>• Parking Ordinance</li> <li>• Community Events Ordinance</li> <li>• Animal Ordinance</li> <li>• Mobile Vending Ordinance</li> <li>• Park Rules Ordinance</li> <li>• Affordable Housing Building Permit Fee</li> <li>• Property Maintenance Code</li> <li>• Building Code Ordinance</li> <li>• Bailey Bill</li> <li>• Unsafe, Uninhabited Structures Ordinance</li> </ul>	Executive Office	Community Quality of Life	17
46	Addition of static License Plate Recognition Systems	Police Department	Community Quality of Life	17
47	Coordinate transit services supporting Old Town Bluffton and other areas with the Lowcountry Regional Transit Authority	Growth Management	Community Quality of Life	17-18
48	Provide updates to the UDO to include: <ul style="list-style-type: none"> <li>• Historic District architectural standard revisions to improve user-friendliness, remove redundancies and conflicts, and clarify terms and requirements;</li> <li>• Establish a minor subdivision application;</li> <li>• Update the sign regulations in accordance with recent court decisions;</li> <li>• Remove the silviculture application process in accordance with State Law; and</li> <li>• Require the provision of street lighting with qualifying development activities</li> </ul>	Growth Management	Community Quality of Life	18
49	Develop a Neighborhood Revitalization Plan (Plan) for Goethe/Shultz Road neighborhood with the goal of applying for a Community Development Block Grant that will aid in the capital improvements identified in the Plan	Growth Management	Community Quality of Life	17-18
50	SCE&G Powerline trimming policy	Executive Office	Community Quality of Life	18
51	Community Park on the May River	Executive Office	Community Quality of Life	17-18

*Town of Bluffton Strategic Action Plan 2017-18*

52	Evaluate Potential Additional Revenue Sources: • Charge for Special Events • Grants • Sale of Town assets • Council position on Local Option Sales Tax	Finance	Fiscal Sustainability	17-18
53	Budget Policy: • Budget fund balance (General Fund) and TIF debt service for Town Hall redevelopment • Budget annually General Fund monies based on a percentage of the business license revenue for business development and support • Fund part or all operating cost charged in Stormwater in the General Fund to provide more money for capital projects	Finance	Fiscal Sustainability	17-18
54	Consideration to provide public access to Town Council Meetings with live stream capabilities	Executive Office	Town Organization	17
55	Establish a Town of Bluffton staff, Boards, Commissions, and Committee's Customer Service Institute	Executive Office	Town Organization	17
56	Implementation of IT Strategic Plan	Finance	Town Organization	17
57	Implementation of File Management and Records Retention Plan	Finance	Town Organization	18
58	Assess asset management software to assist in the tracking, documentation, maintenance, and overall management of Town-owned assets	Engineering	Town Organization	18
59	Initiate the update of the 2007 Comprehensive Plan as required by State Law	Growth Management	Town Organization	18
60	New Employee Onboarding and Integration	Human Resources	Town Organization	16-17
61	Town Staff Corporate Social Responsibility Program	Human Resources	Town Organization	16-17
62	Enhancements to Voluntary Benefits - Telemedicine and Long Term Care Coverage	Human Resources	Town Organization	17-18
63	Move into new 3600 sq. ft. location at Kroger Marketplace	Don Ryan Center for Innovation	Town Organization	17
64	Investigate feasibility of increasing number of Town Council members from 5 to 7	Executive Office	Town Organization	16-17



# bluffton

HEART OF THE LOWCOUNTRY